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France

Processed Sweet Corn

Annual

2003

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Report Highlights:

France is the largest producer of sweet corn in Europe, with 85 percent of the canned sweet corn production and 70 percent of the frozen sweet corn production in 2002. However, in 2003, EU and French sweet corn production was severely damaged by drought and abnormally high temperatures. These climatic conditions favored the development and infestation of the corn ear worm throughout the French sweet corn production area. Production is expected to shrink 20 percent from 2002 levels. French sweet corn competes with U.S., Thai and Hungarian products in the EU and and Russia. The favorable exchange rate of the U.S. dollar favored U.S. exports to Europe in MY 2002/03 and the decline in the 2003 European harvest may be a new marketing opportunity for U.S. products.

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Includes Trade Matrix: Yes
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Executive Summary

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Statistical Tables

PS&D Table

PSD Table							
Country	France						
Commodity	Canned Sweet Corn				(MT)(Dec. Fraction)		
	2001	Revised	2002	Estimate	2003	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		07/2001		07/2002		07/2003	MM/YYYY
Production Gross WT	243000	269800	0	285100	0	230000	(MT)
Production Net WT	146386	162530	0	171747	0	138554	(MT)
Conv. Rate Net/Gross	1	1,660001	0	1,66	0	1,660003	(Dec. Fraction)

Trade Matrices (Source: Eurostat)

Export Trade Matrix

Country	France			
Commodity	Canned Sweet Corn			
Time Period	Jan-June	Units:	MT	
Exports for:	2001		2002	
U.S.	0	U.S.	0	
Others		Others		
Germany	27432	UK	25873	
UK	22773	Germany	22653	
Spain	21288	Spain	20156	
Italy	12481	Italy	13363	
Belgium	6336	Belgium	5195	
Russia	4939	Sweden	3871	
Sweden	4331	Denmark	2670	
Switzerland	3417	Switzerland	2215	
Denmark	2632	Russia	1746	
Israel	1487	Austria	1200	
Total for Others	107116		98942	
Others not Listed	9562		9456	
Grand Total	116678		108398	

Import Trade Matrix

Country	France			
Commodity	Canned Sweet Corn			
Time Period	July-June	Units:	MT	
Imports for:	2001		2002	
U.S.	183	U.S.	148	
Others		Others		
Germany	2367	Germany	2379	
Thailand	1846	Thailand	2115	
Netherlands	1119	Netherlands	1606	
Italy	746	Spain	916	
Spain	531	Italy	532	
Canada	278	Canada	266	
Total for Others	6887		7814	
Others not Listed	392		232	
Grand Total	7462		8194	

During the same period (MY 2001/02 and 2002/03), French frozen sweet corn trade was as follows (source: Eurostat):

Export Trade Matrix			
Country	France		
Commodity	Frozen Sweet Corn		
Time period	July-June	Units:	MT
Exports for:	2001/02		2002/03
U.S.	0	U.S.	0
Others		Others	
Belgium	5318	Belgium	5074
UK	5161	Germany	928
Germany	1258	Netherlands	766
		UK	754
Total for Others	11737		7522
Others not Listed	1526		889
Grand Total	13263		8411

Import Trade Matrix			
Country	France		
Commodity	Frozen Sweet Corn		
Time period	July-June	Units:	MT
Imports for:	2001/02		2002/03
U.S.	71	U.S.	0
Others		Others	
Spain	1042	Germany	1610
Belgium	1620	Spain	1433
Netherlands	488	Belgium	1407
Total for Others	3150		4450
Others not Listed	1001		952
Grand Total	4222		5402

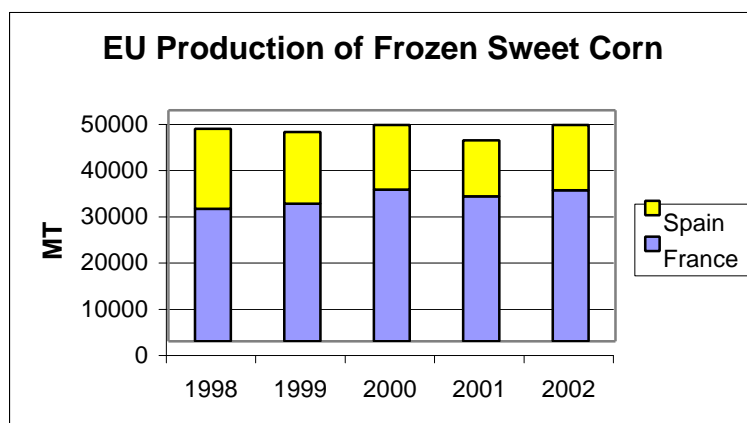
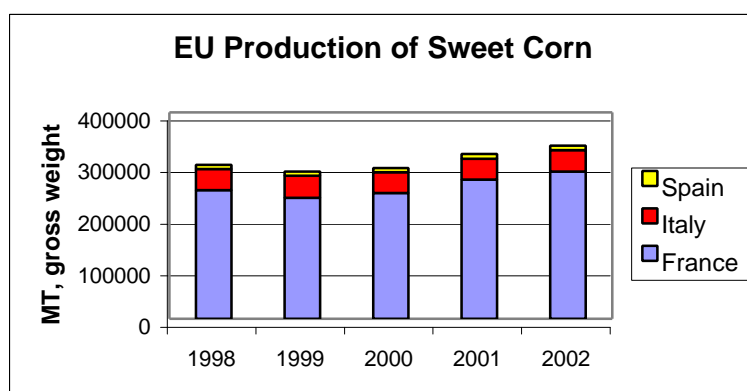
Source: Eurostat

Production, Supply and Demand

Production

France is by far the largest producer of sweet corn in the European Union. In 2002, French production accounted for 85 percent of EU canned sweet corn production, and 70 percent of EU frozen sweet corn production. Most of the French production is canned, to meet domestic consumption and export demand, while the frozen market is limited. Fresh sweet corn production is marginal, as consumption is almost non-existent in France. The area planted to sweet corn was 29,780 ha in 2002, of which only 2,000 ha were for fresh sweet corn production.

The graphs below indicate that France has had a leading position in the sweet corn market for a number of years:



The 2003 French sweet corn crop was severely affected by drought and by a new pest (*Heliolithis hermigera*, or corn ear worm), which infested 10 percent of the plantings. This pest is usually found in African countries. The pest favors extreme heat. The abnormal heat and drought of the summer 2003 favored its development in France. As a result, French sweet corn production is estimated to shrink 20 percent in 2003.

In France, there are 14 factories canning sweet corn that belong to the companies Bonduelle, Conserves France, D'Aucy, and Green Giant (Géant Vert). There are 7 plants freezing sweet corn: Aquitaine Surgelés, Bonduelle, D'Aucy, and LLS.

Consumption

In 2002, 68 percent of French households purchased canned sweet corn. The number of buyers of canned sweet corn increased slightly (0.3%) from 2001 to 2002.

The EU per capita consumption of sweet corn (1.5 kg per year) remains significantly lower than the U.S. per capita consumption of sweet corn (2.5 kg per year). However, French per capita consumption is one of the highest in Europe.

Trade

France is a net exporter of sweet corn, and exports half of its production, mainly to Germany, the United Kingdom and Spain. In France and Europe, French sweet corn competes with U.S., Thai, and Hungarian products.

In MY 2002/03, French exports of canned sweet corn to Germany, Spain and Russia declined to the benefit of U.S. and Hungarian exports, due to the increasingly favorable exchange rate of the U.S. dollar (see report FR3026, 6/25/03). Similarly, French exports of frozen sweet corn to Germany declined significantly.

Marketing

The leading French importers of U.S. sweet corn are the following:

Canned sweet corn: TRIOMPHE/SNAT
105, rue Paul Vaillant Couturier
92300 Levallois-Perret
monarch@club-internet.fr
Tel: (33-1) 41 27 21 30
Fax: (33-1) 41 27 21 35

Société Soreau
52, rue Molière
94203 Ivry sur Seine
Tel: (33-1) 46 70 10 66
Fax: (33-1) 46 70 28 37

Fresh sweet corn: Unicorn Provence
Campagne Les Aubettes
84120 Pertuis
Unicorn-provence@wanadoo.fr
Tel: (33-4) 42 61 92 26
Fax: (33-4) 42 61 99 64